PROGRAM PLANNING CHEAT SHEET
STRATEGIC DIRECTIONS,
‘TRACDAT’ “SWOT” AND INITIATIVES/RESOURCES

STRATEGIC DIRECTIONS

THINGS TO REMEMBER

- Pick 2-3 Strategic Directions you want to focus on (though all CTE programs must address Strategic Direction 3).
- Be sure to consider the college’s priorities (for example, completion)
- Focus on what you expect students to be able to do by coming to your class or program, instead of justifying each piece of your work
- Keep it short and sweet (with a clear, concise explanation)
- Use bullet points over long dialogue
- Be sure to complete your SWOT at the very end (after Strategic Direction 5).

WHERE TO START

Moorparkcollege.edu -> Quick Links -> Institutional Research and Planning -> Program Review (click the blue words/link)

LOGINS

1) You need to login first to the Sharepoint site using your computer/portal logon. (the “Where to Start” steps in this document will take you to the Sharepoint login page)
2) Then you will need to login to Tableau.
3) Once you log in to Tableau and you have clicked on a Strategic Direction, the data should begin to populate and you will see Nuventive: Impact (“TracDat”) on the right.

*If you do not have a Tableau login or a TracDat account, please contact the IE office.

STEPS

Once you are in the system:

1) On the left side, click Strategic Direction 1
2) Select your program on the right side (Nuventive). If you are responsible for more than one program, you will have access to each one.
3) Click the Blue-green plus sign to open up the new reporting screen. 
4) Select the current reporting year: 2019-2020
5) As you look at the Tableau dashboard you may need to click the “open in full window” link. This will open the dashboard in another window so you can see everything **and filter the data.**
6) Filters are on the right side. For example, the demographic dashboard can be filtered by Term or Academic Year; Program; and Ethnicity, Age, or Gender.
7) At the bottom of your dashboard you will see the Campuswide figures.

8) Toggle back to the integrated program planning page (you may need to click the other webpage tab to access the window).
9) Now you begin writing your analysis in the "Analysis of Data" window.
10) Report any actions you plan to take in the "Suggested Action" window.
11) Select a **conclusion** for the overall trends in the Strategic Direction you are reporting on.
12) If you want to add any supporting documents you can at the bottom of the Nuventive: Impact screen.
13) Click the yellow **save button** as you go and when finished.
14) Now select the next Strategic Direction and repeat steps 2-13. As noted earlier, you only need to complete 2-3 Strategic Directions (though all CTE programs must complete Strategic Direction 3).

EXAMPLES OF WHAT TO INCLUDE

- You might look at your **success rates** overall, and then drill down into demographic groups and look at which groups are not doing as well as the overall success rate. How might you help them?
- You could look at your **program enrollment** and filter by your choice of demographic (race, age, gender) to see if your program is not reaching a particular group. Are there **equity gaps** (compare with the overall campus numbers)? Would you expect this for your program? Is there anything you can do to close the equity gaps and increase access?
- You can look at **course success rates** in relation to the rest of your program by clicking on specific courses. Why might some courses have better or worse success rates in comparison to others?
- What do you need to help you reach these goals?

**These are just a few examples to get you started.*

TIPS

- Always be sure to click "Save" after you have entered data into the TracDat window (Nuventive: Impact). Otherwise your work may be lost.
- In your dialogue, **quote specific numbers** you are analyzing, rather than just using generalizations. For example, "we have a 60% success rate in our program overall."
- **Address each question** for the Strategic Direction, unless the question does not pertain to your program, and at least one goal to illustrate alignment with the college's Work Plan.

- You can add a screen shot of the data you are reporting, if you would like. This is *optional*. This feature is available in the integrated program planning page, not the expanded Tableau dashboard.
- Click on the camera icon to begin the process and add the picture to your program plan. Click save.
- Your previous SWOT is saved as a PDF in your Document Repository.

TRACDAT SWOT & INITIATIVES/RESOURCES

OVERALL

- We have worked to simplify and streamline the SWOT and Resource Requests/Initiatives section so that it is ***simpler to complete.***
- You probably have already completed your Strategic Direction / Tableau analysis and brief write-up. If not, we recommend you do that piece before working on the SWOT and resource requests.
- Your SWOT analysis is "strengths, weaknesses, opportunities, and threats"—generally speaking strengths and weaknesses are internal to your program whereas opportunities and threats are external.

WHERE TO START

Once you are in Tableau on Sharepoint (the program planning site), **find SWOT** under Strategic Direction 5 on the left side. Click SWOT.

LOGINS

If you do not have a "TracDat" account or forgot your password, please contact the IE office.

STEPS

Program / General Information

- Generally speaking the description is static; only change this if your program has notably changed
- Once you have selected the General Information link on the left—select the Edit button on the far right
- Review the contacts and change who wrote the plan (for this year), and the department Chair and Dean if any staff have changed
- Once everything is updated as needed, click save

Strategic Planning / SWOT

- Select the SWOT link under Strategic Planning on the left
- You will see your previous years SWOT analysis pop-up
- *Keep in mind that our program planning is now running in 3 year cycles;* in the next 3 year cycle some historical years plans will be archived but you will still have access to your most recent year

- Select the copy button to copy your previous year; OR you can start from scratch with the add button (plus sign in green)
- Be sure to assign the current year in the "Prog Review Reporting Year"
- Focus your discussion of Strengths and Weaknesses on your program and focus Opportunities and Threats on external impacts to your program (e.g., state policy changes, campus visions, etc.)
- Click Save (NOTE: if you click Return what you typed will be lost)

Strategic Planning / Initiatives/Resources

- Your **Initiatives** should be focused on "program improvement"; they may be broad scale—there is a separate place to document resource requests
- Not all Initiatives are tied to Strategic Directions—for example, creating new courses for your program will not be reported in the Strategic Directions/Tableau sections
- If your Initiative is active for this year, keep it active. If it is no longer active, be sure to change the status to "inactive" if you are not focusing on it this year or "completed" if you have completed the initiative.
- Add the current year under "Initiative Years" if the Initiative is currently active. *This is important as without entering the current year for active initiatives, they will not show up in the report for Exec Council.*
- **Resources** show up under each Initiative; there may be multiple resource requests under one initiative or there may be just one request
- Be sure to review each resource request and update them as needed—such as, if you received the resource last year mark the status of the resource request as "received"
- If you uncheck the "active" box, it will be hidden if you don't want to see it
- **Justification** needs to be filled out completely. Make sure to state your case as to why the request is needed. Give as much detail as needed.
- **Resource Category** is how the resource request should be classified. This is important as improperly categorized requests may have difficulty getting funded as they are competing with other 'properly categorized' requests. A) Faculty Request—this is only for new faculty you are requesting. B) Classified Request—this is also only for new staff (classified) you are requesting. C) Facilities Need—anything that requires assistance from the facilities department (additional space/building needs).
- **Funding Source** is most often going to be "general"; however, if you know how the request should be funded otherwise, like categorical funds, select that.
- **Grant Opportunities** is for any grants that you/your department are applying for which would be an appropriate source of funding for this request.
- **Priority**, try to keep this balanced. The items that you feel are super high priority, make High; otherwise, allocate them as medium or low.

- **Cost** should always be the total aggregate cost for the request. For example, if you are requesting 5 desks at $200 apiece, the cost entered would be $1,000.Be sure to click Save before you moving on.

Strategic Planning / Updates

- Updates is where you want to document how much progress you are making on an initiative.
- Under "related documents" you can also associate any documents in your "document repository" with the update you just reported on.

TIPS

- **Always be sure to click "Save"** after you have entered data into the TracDat window (Nuventive: Impact). Otherwise your work may be lost!
- **Initiatives should all be marked with current status**—active, inactive, or completed for this year.
- **All Resource Requests should be updated** as to whether or not they have been **received.**
